

# TRANSFER OF WEALTH

*Imagine the Possibility of 5% for  
Every Community in Eastern  
Washington and North Idaho*

**March 3, 2020**



# William A. Crosetto

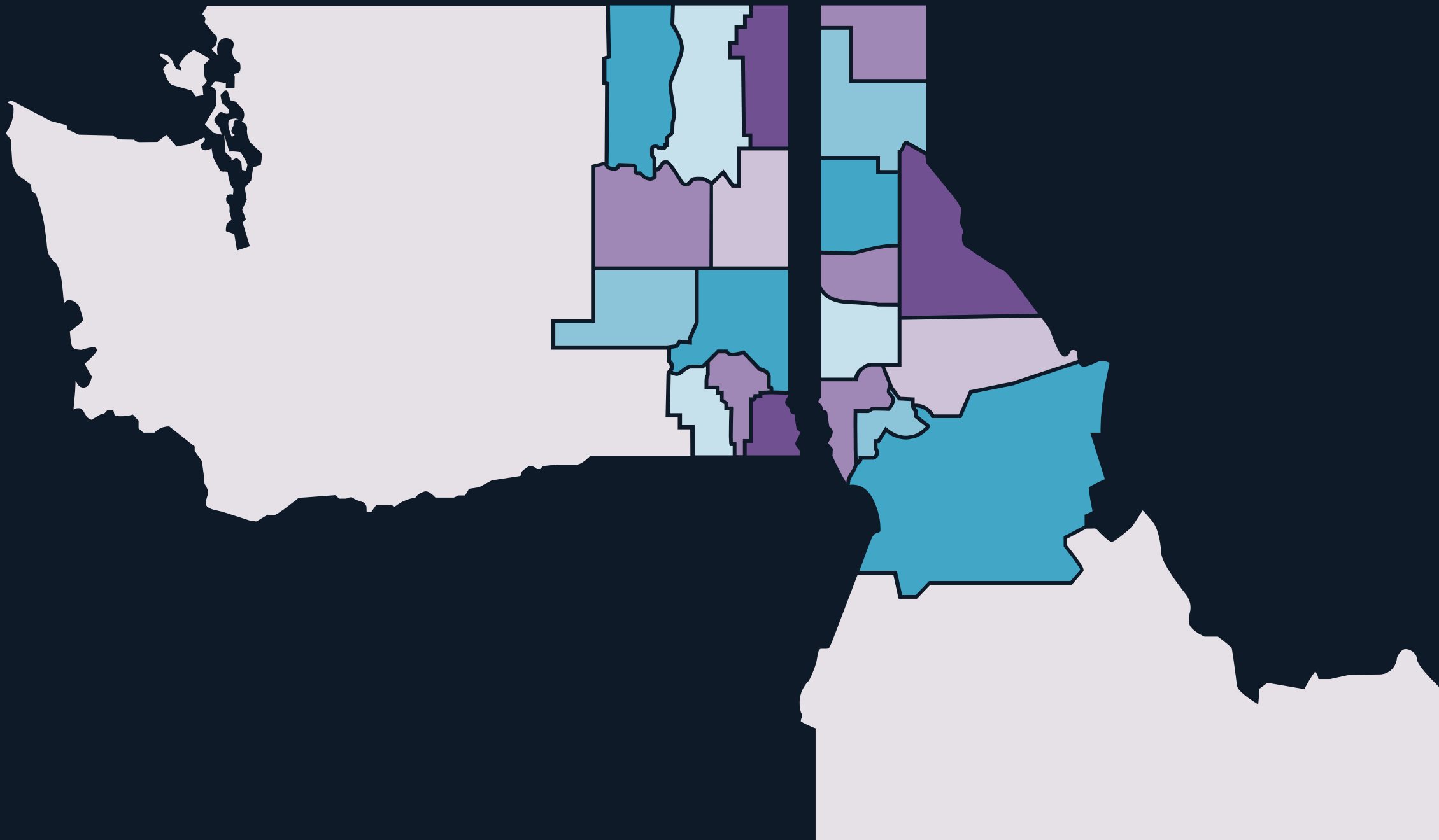


Rural Residency Fund

Rural Healthcare Initiative Fund

Rural Civic Engagement Fund

And more...





“There is no wealth,  
here in \_\_\_\_\_”



# WHO WE ARE

Innovia Foundation **ignites generosity that transforms lives and communities.** As the community foundation for Eastern Washington and North Idaho, we envision **vibrant and sustainable communities**, where every person has the opportunity to thrive.



# Russell James III, Ph.D., J.D., CFP

Professor and Chair, Personal Financial  
Planning

Texas Tech University



The background of the slide is divided into three horizontal sections. The top and bottom sections are a dark purple color and feature a white grid pattern composed of overlapping circles. The middle section is a solid light green color and contains the main text.

What would you do with a  
million NonProfit 990s?



# 5-YEAR AVERAGE GROWTH IN TOTAL FUNDRAISING

2010-2015

## Nonprofits receiving ONLY CASH gifts

2,548 nonprofits raising \$1MM+ in 2010 reported only cash gifts in 2010 & 2015 on e-file IRS-990

**11%**  
GROWTH

## Nonprofits receiving SECURITIES NONCASH gifts

2,143 nonprofits raising \$1MM+ in 2010 reported securities gifts in 2010 & 2015 on e-file IRS-990

**66%**  
GROWTH

THE CHRONICLE OF  
**PHILANTHROPY.**

\$

# Trillion

and counting

**How charities can tap into the transfer of wealth**



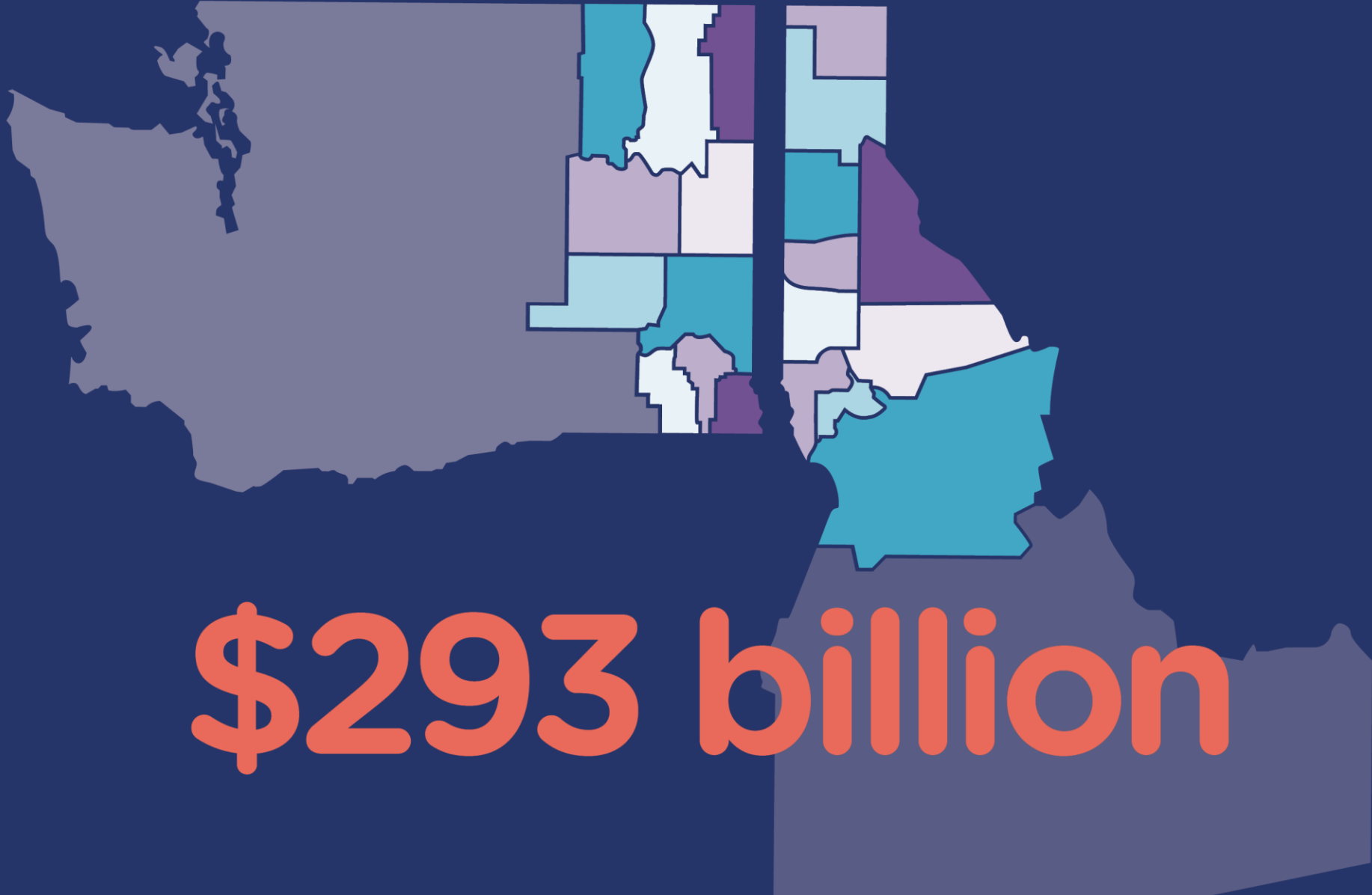
“Foundations can root  
wealth”

Deb Markley, Locus Impact Investing

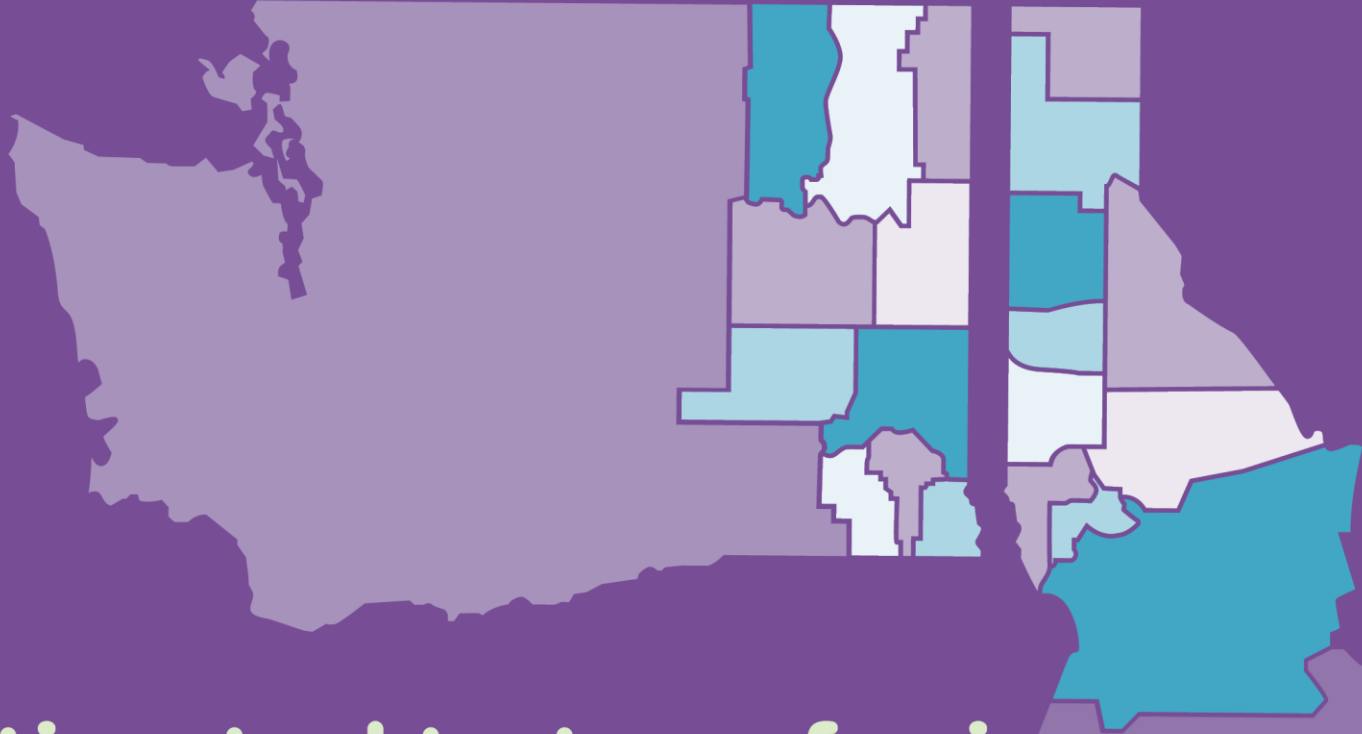


“There is no wealth,  
here in \_\_\_\_\_”

# Estimated net worth in our region today is

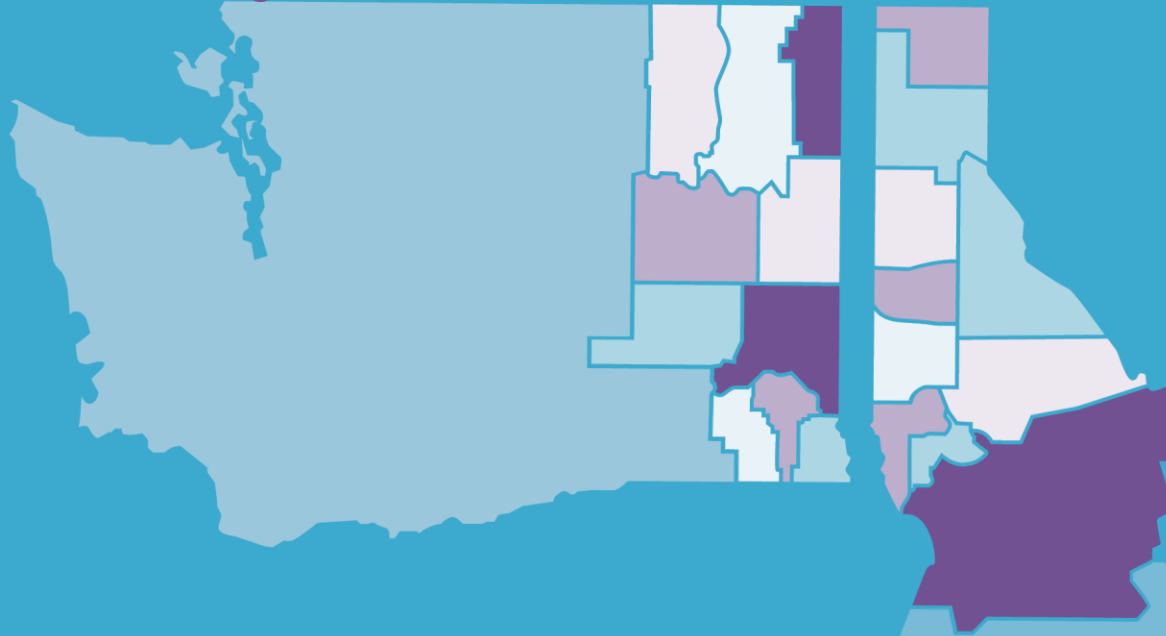


Over the next 10 years,  
**\$42 billion**



is estimated to transfer in our region from  
one generation to the next.

If just **5%** of the transfer of wealth was  
designated for our local communities, over  
**\$2 billion**



could be invested in new endowments to positively  
impact the region for generations to come.

Investing **5%** of the regional transfer of wealth in  
new endowments would provide over



**\$100 million**

in annual grantmaking in just 5 years.





**It's not about the money.  
It's about the dream.**

# Southwest Initiative Foundation





# Henry Treede

## Supporting Organization



# Shickley Community Foundation





# Margaret F. Galbraith Community Fund



# Holt County Economic Development Organization






# WHAT NEXT??

## 3 Ways We Can Work Together.

The background of the image features a teal-to-blue gradient with a pattern of overlapping, curved, wavy lines in a lighter shade of blue, creating a sense of movement and depth.

**Work Together to Raise  
Community Awareness**





# Create a Shared Vision for Community Endowments



# Ignite Generosity Through Vision and Impact



INNOVIA  
FOUNDATION

*Vibrant and Sustainable Communities*

